Ethnographic Case Study (ECS): Abductive modeling of ethnography and improving the relevance in business marketing research

Luca Massimiliano Visconti *

Università Commerciale "L. Bocconi", Marketing Institute — Management Department, Via Röntgen 1, 20136 Milan, Italy

ARTICLE INFO

ABSTRACT

By extending interpretative methods to business settings, this paper formalizes a model of Ethnographic Case Study (ECS) built upon extensive literature review and abductive elaboration of two-year fieldwork on 12 Italian companies. Objectives and related contributions are twofold. First, key compulsory and complementary stages of ECS marketing research are presented for business contexts. Second, the paper envisions the quality of the knowledge generated through the ECS inquiry, and argues that the methodological peculiarities of this approach may help reduce the relevance gap affecting business research. The systematic cooperation between researchers and practitioners along the ECS phases may benefit relevance through (i) the fine tuning of reciprocal expectations, (ii) the sharing of the research experience, (iii) the multiplication of the beneficiaries of the findings granted by ECS, and (iv) the participation in the process of knowledge dissemination. In this light, the ECS model supports the convincement that methods are not only a way to theory validation but also to theory discovery.

Matthyssens and Vandenbempt (2003: 595) have recently attributed the qualification of 'contexts of discovery' to contemporary business environments by acknowledging their increasing dynamism, complexity and unstructured conditions. From the epistemological and methodological viewpoints, this implies extending the timeframe of analysis and the range of methods applicable to business research by means of longitudinal and multidisciplinary approaches (Colarelli O'Connor, Rice, Peters, & Veryzer, 2003). More precisely, business research may profit from extensive, sounder application of *interpretative methods* (Gummesson, 2003: 491–492), which potentially allow thicker descriptions of organizational reality and richer representations of companies' lived experience. The so-called interpretative approach postulates that individuals' sensemaking processes and behavioral responses reflect the way they interpret information and facts personally experienced (Rabinow & Sullivan, 1979). As such, relations, including those occurring within organizations and marketplaces at large, are strongly affected by the social construction of meanings through interpretative practices.

Sailing along the interpretative stream, Cova and Salle have similarly commented how the IMP group has frequently ritualized the maintenance of traditional research methods and the clear cut separation between business and consumer research in order to reassert the IMP collective identity (Cova & Salle, 2003: 11). Instead, the same authors argue that the 'IMP ritual scapegoat' could be better

sacrificed so as to welcome alternative ways to represent business contexts in more vivid, meaningful terms (Cova & Salle, 2003: 13–14).

The paper is positioned within the emergent stream of contributions exploring the potential of the interpretative methods — and ethnography in particular — for business research (Borghini, Golfetto, & Rinallo, 2006; Cova & Salle, 2003; Pettigrew, 1979; Rinallo & Golfetto, 2006; Van Maanen, 2006), where business and organizational research are used here as synonyms to address those fields of inquiry where companies are the main focus of investigation, regardless of their industry of belonging and of the consumer/industrial nature of the goods/services being traded. By focusing on the ethnographic investigation of business cases, the paper discusses the specificities of data collection and interpretation within organizational settings while parallely commenting how ethnography may benefit the relevance of business research. Thus, attention is directed here to the application of ethnography to organizational case study research and to the methodological and epistemological implications of diverting ethnography from the traditional consumer side.

By bridging the two separate domains of *organizational ethnography* (to list but a few, see reflections by John Van Maanen, 1979, 2006; Michael Rosen, 1991) and *case study* research (among others, on single case study, see Robert Yin's 1994 milestone work, while on multiple case study confront Kathleen Eisenhardt, 1989) this work documents the formalization of the Ethnographic Case Study method (ECS). To date, in fact, we lack theoretical and methodological contributions on ethnographic case analysis, since previous works are basically examples of *applied* organizational ethnography both on single (e.g. Carlile, 2002, 2004; Gioia & Chittipeddi, 1991; Rinallo &

* Tel.: +39 02 5836 3701.
  E-mail address: luca.visconti@unibocconi.it.

Golfetto, 2006; Vaast & Levina, 2006) and multiple business cases (e.g. Borghini et al., 2006; Meyer, Gaba, & Colwell, 2005; Staudenmayer, Tyre, & Perlow, 2002). As such, these studies remain focused on the presentation of purely research specific findings and thus do not help elaborate a more generalizable model of ECS research.

Relying on extensive literature review of organizational ethnography (Table 1) and on abductive reasoning (Dubois & Gadde, 2002: 555; Van Maanen, Sørensen, & Mitchell, 2007: 1149) stimulated by a two-year ethnographic study on 12 companies operating in Italy, I illustrate and discuss here a model for conducting Ethnographic Case Study research (ECS) in business settings. By ECS I signify the application of the ontological, epistemological and methodological features of ethnography to a theoretically selected set of business cases. As stated above, previous studies applying business ethnography mainly show the following limitations. First, these works seldom question — nor they theorize — the methodological aspects of doing ethnography within organizational settings, and therefore leave business scholars without structured ideas of how ethnographic inquiry may be replicated in other business environments. Second, these papers mostly relate to the organizational literature more than to the marketing one. So, my contribution tries to conceptualize the methodological features of ECS, while additionally tailoring such reasoning to the marketing realm. Complementarily to the formalization of the ECS model, the paper illuminates the improvements obtainable in terms of the relevance of business research (Starkey & Maden, 2001: 3). In particular, the ECS approach can be conceptualized as a means to manage the trade off between conceptual knowledge and instrumental knowledge (Pelz, 1978: 349). In so doing, I argue the ways ECS research is framed, applied, deployed for theory generation and eventually disseminated help reconcile the needs of theoretical and

epistemological validity endorsed by the scientific community with the quest for easily applicable theory to managers' everyday decisions.

As such, the paper is oriented to: (i) formalize a general model of Ethnographic Case Study marketing research in organizational settings; and (ii) illustrate how ECS research may ultimately help overcome the so-called 'relevance gap' (Starkey & Maden, 2001: 3) through direct, ongoing cooperation between researcher(s) and practitioner(s) involved in the study.

The collaborative ethnographic fieldwork is discussed parallely to the illustration of objectives, researcher's and practitioner's roles, and tools deployable along the key phases of inquiry (details available in Fig. 1). In so doing, the paper denies any 'cookbook like approach', since the general model should not be intended as an automatic plot exempt from the need for contextualization imposed by the specificities of the selected business cases. It rather constitutes a preliminary though partial attempt to provide business researchers with a general grid to critically enter the ethnographic investigation of contemporary business environments.

Consistent with the objectives declared above, the paper is articulated in five sections. Firstly, I illuminate the theoretical and empirical foundations of the ECS model proposed hereafter, including (i) the theoretical review of the literature on organizational ethnography and (ii) the field study stimulating my abductive reasoning. Then, I address the two research questions. In the third section, in fact, I detail the ECS model by maintaining the separation between the fieldwork (i.e. data collection and interpretation) and textwork stages (i.e. writing). In the fourth section, I finally illustrate the relevance gap, and contextualize it to the opportunities and limitations presented by ECS. In particular, I look at the relationship linking researcher(s) and practitioner(s) so as to detect both rationales and possible, partial

Table 1
Reviewing business research conducted through ethnographic techniques.

Author(s) (alphabetical order)	Topic	Empirical setting	Method(s)	Single vs multiple case	Fieldwork temporal extension[a]
Bechky (2003)	Occupational communities and shared knowledge/meaning	Semiconductor equipment manufacturing company	Ethnography + document analysis	Single	Mildly extended
Borghini et al. (2006)	Ongoing information search of industrial buyers at trade shows	Eleven trade fairs in the textile-apparel and wood-furniture industries	Ethnography (tracking, interviewing and observation) and desk analysis	Multiple	Extended
Carlile (2002)	The paradoxical role of knowledge in new product development	One fuel system valves company	Ethnography	Single	Mildly extended
de Rond, and Bouchikhi (2004)	The dialogical lecture of interorganizational alliances	One alliance between a major pharmaceutical firm and a biotechnology start-up	Ethnographic interviews and archival research	Single (as presented in the paper)	Extended
Gioia, and Chittipeddi (1991)	The role of meaning attribution and participation in organizations' strategic changes	One multi-sited public US university	Ethnography + follow-up distant observation	Single	Extended
Kellog et al. (2006)	Communities' cross-boundaries coordination praxes	One web-interactive marketing company	Ethnographic interviewing and observation	Single	Limited
Meyer (1982)	Adaptation to organizational jolts	19 hospitals	Brief ethnography (on three hospitals) and survey, pictorial diagrams and organizational charts on the whole sample	Multiple	Limited (Brief)
Meyer et al. (2005)	Nonlinear change in organizational fields	Six conferences on nanotechnologies	Methodological bricolage, including ethnography and natural history	Multiple	Extended
Pettigrew (1979)	Social dramas elaboration in organizational settings	One British boarding school founded in 1934	Longitudinal field analysis + retrospective analysis	Single	Extended
Rinallo, and Golfetto (2006)	Concentration in trade fair collective events	Première Vision trade fair in the clothing fabric industry	Ethnography and document analysis	Single (considering the trade fair under observation)	Extended
Staudenmayer et al. (2002)	The role of temporal shifts in organizational change	Three technology intensive companies	Desk ethnography (ethnographic interpretation of secondary data)	Multiple	Extended (2 out of 3 cases)
Vaast, and Levina (2006)	Organizational redesign in IT contexts	One European insurance company	Ethnography	Single	Extended
Van Maanen (1975 and following)	Motivation, commitment and need satisfaction of patrol officers	Union City Police Department	Ethnographic participant observation + questionnaires	Single	Extended

[a] Limited (brief) = less than one year fieldwork; mildly extended = around one year fieldwork; extended = multi-year fieldwork.